Beneficiary Relationship Development and Management

Customer Service

Accept Inquiry / Request (B.1)
- Verify Beneficiary Identity (B.1.1)
- Document Contact (B.1.2)
- Verify Right to Information (B.1.3)

Prepare Information (B.2)
- Update Beneficiary's Personal Data (B.2.1)
- Perform Research and Analysis of Integrated Data (B.2.2)
- Contact Appropriate Operational Office (B.2.3)
- Transfer Inquiry / Request to Appropriate Operational Office (B.2.4)

Communicate Information (B.3)
- Issue Response Verbally (B.3.1)
- Issue Response via Hard Copy (B.3.2)
- Issue Response via Internet (B.3.3)
- Conduct Follow-up (B.3.4)
- Conduct Satisfaction Survey (B.3.5)

Improvement & Accountability

Analyze Inquiry / Request Data (B.4)
- Analyze Tracking Data (B.4.1)
- Package Business Improvements (B.4.2)

Relationship Building

Provide Beneficiary Outreach (B.5)
- Conduct Outreach Activity (B.5.1)
- Post Outreach Activity (B.5.2)

Beneficiary Asset Counseling (B.6)
- Provide Counsel on Asset Options (B.6.1)
- Facilitate Beneficiary Interests in Asset Management (B.6.2)
  - Beneficiary Involvement for Ownership (B.6.2.1)
  - Beneficiary Involvement for Land & NR Planning (B.6.2.2)
  - Beneficiary Involvement for Land & NR Use & Mgt (B.6.2.3)
- Account Administration (B.6.3)
  - Beneficiary Account Administration (B.6.3.1)
  - Receivable Administration (B.6.3.2)
  - Payable Administration (B.6.3.3)